Document Permission Categories

SUMMARY
Learn about *Document Permission Categories.*

Introduction

Document *Permission Categories* let the system know who should be able to view a doc on a transaction. Every doc added to a transaction must have a *Permission Category*.

Permission Categories are an added layer of security that allow you to make each doc accessible (or inaccessible) to agents and admins who have access to the transaction.

Below is a list of who has visibility for each*Permission Category*:

- *Office* - Office Staff
- *Listing* - Listing Agents and Office Staff
- *Sale* - Listing Agents, Buying Agents, and Office Staff
- *Buyer* - Buying Agents, and Office Staff
- *Public* - Listing Agents, Buying Agents, and Office Staff
- *Private* - The user that set the doc to*Private*, and Office Staff

In order to view docs on a transaction, agents or admins must first have access to view the transaction.

Set Permission Categories

The system already comes loaded with all the possible*Permission Categories* you'll need, so there's no setup needed for the categories themselves. However, we recommend automating the *Permission Category* selection process by presetting *Permission Categories* for each of your *Standardized Doc Names,* when applicable.

Pre-set Permission Categories for Document Names

To save time and help agents and admins comply with your company's document access protocol, you can preset *Permission Categories* for your *Standardized Doc Names*. When a *Standardized Doc Name* that has a preset *Permission Category* is applied to a doc, the *Permission Category* will be automatically applied.

To pre-set a *Permission Category* for a document name:

1. **Go to the *Standardized Doc Names* area** by clicking your name in the upper-right, then [Admin / Settings], and select [Document Names] from the *Customize* section of the left menu.
2. To the right of a *Document Name*, **click the gear and select [Edit]**.
3. In the *Default Permission Category* column, **select the dropdown and choose your preferred *Permission Category*.**.
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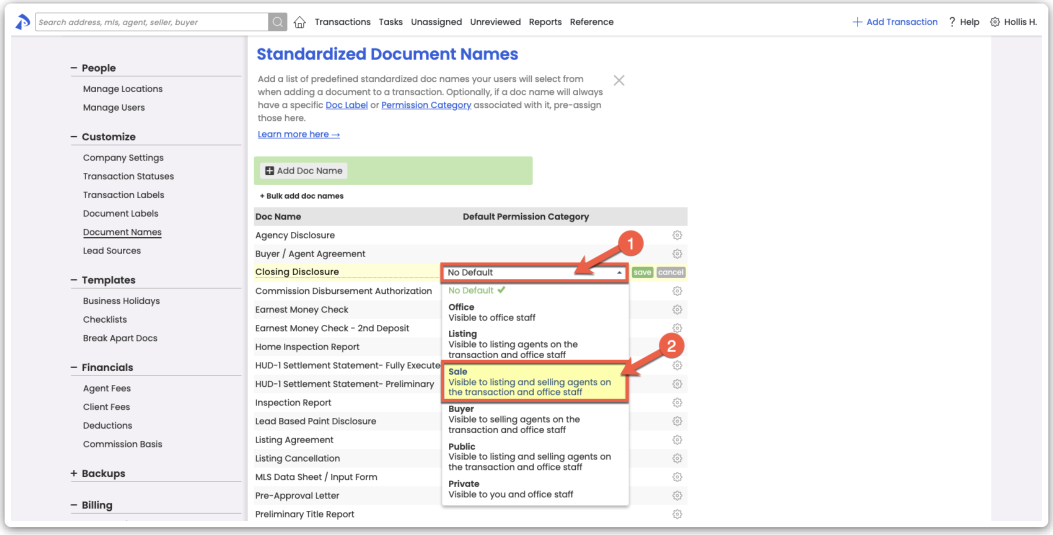


5. **Click [Save]**. The *Document Permission Category* will be pre-associated to the *Document Name* so that whenever a doc is given that name, the pre-associated *Permission Category* will be automatically applied.

Apply Permission Categories to Docs

Who Can Do This? Agents and admin with permission to *Assign Docs* have the option to set a document's *Permission Category*.

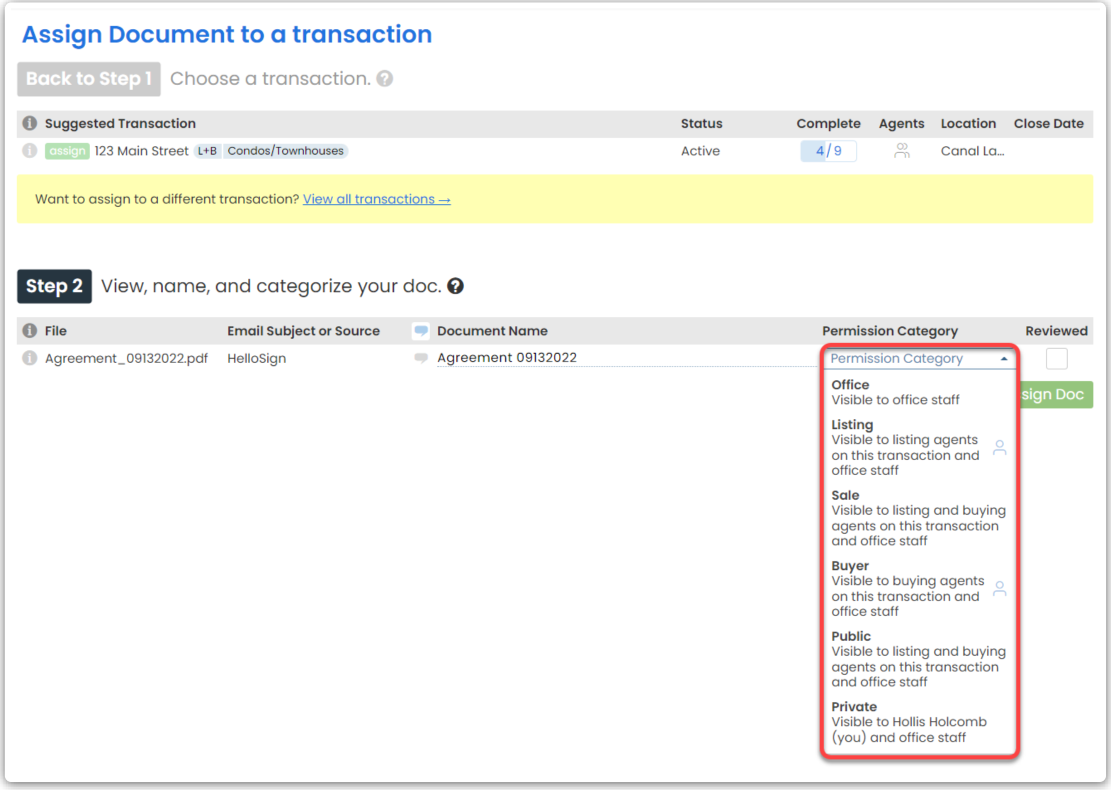
• Agents can only set *Permission Categories* to categories they have access to view, and only on documents assigned by them that have not yet been marked as *Reviewed*.

• Admins can set *Permission Categories* of all documents.

Set a Document's Permission Category

Whenever a doc is added or updated on a transaction, a *Permission Category* must be set for the doc to let the system know who should be able to view the doc.

Learn more about Assigning Docs to Transactions →

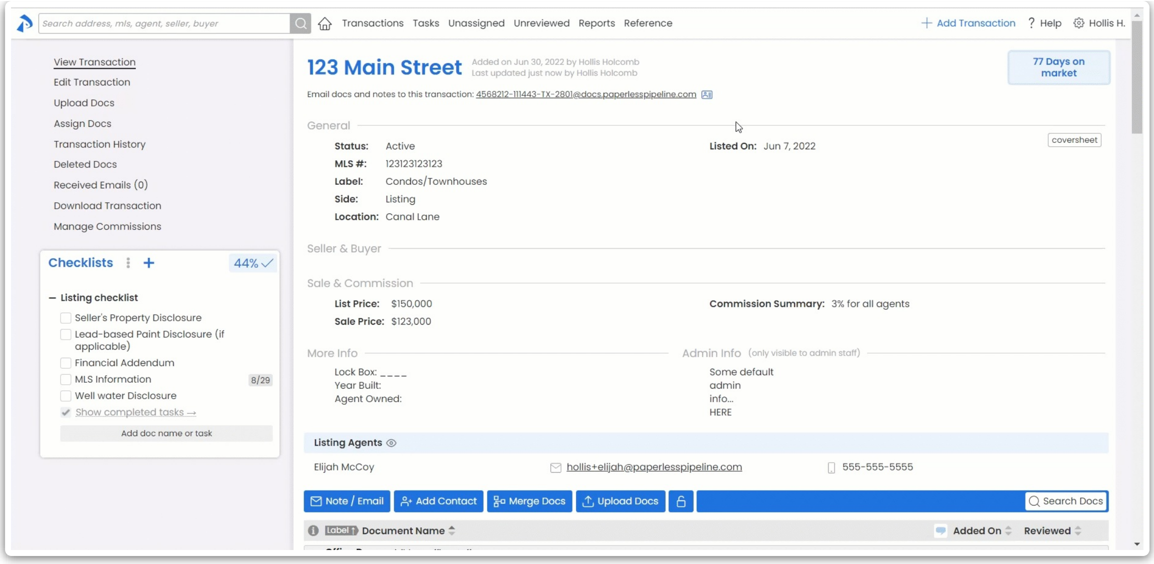


Bulk Change Document Permission Categories

When documents were assigned to the wrong *Permission Category* or need to be moved to a different *Permission Category* as part of your transaction workflow, you can bulk update them with just a couple clicks.

To update *Permission Categories* of multiple docs at once:

1. Above the *Docs Area* on a transaction, **click the .**
2. **Click the checkboxes next to the docs** whose *Permission Categories* you'd like to update.
3. **Select your desired *Permission Category*,** then **[Update Permission Category].** The docs will be moved to your chosen *Permission Category*.


Search address, mls, agent, seller, buyer
Transactions
Tasks
Unassigned
Unreviewed
Reports
Reference
+ Add Transaction
? Help
Hollis H.
View Transaction
Edit Transaction
Upload Docs
Assign Docs
Transaction History
Deleted Docs
Received Emails (0)
Download Transaction
Manage Commissions
Checklists
44%
Listing checklist
Seller's Property Disclosure
Lead-based Paint Disclosure (if applicable)
Financial Addendum
MLS Information
8/29
Well water Disclosure
Show completed tasks →
Add doc name or task
123 Main Street
Added on Jun 30, 2022 by Hollis Holcomb
Last updated just now by Hollis Holcomb
77 Days on market
Email docs and notes to this transaction: 4568212-111443-TX-2801@docs.paperlesspipeline.com
General
coversheet
Status: Active
MLS #: 123123123123
Label: Condos/Townhouses
Side: Listing
Location: Canal Lane
Listed On: Jun 7, 2022
Seller & Buyer
Sale & Commission
List Price: $150,000
Sale Price: $123,000
Commission Summary: 3% for all agents
More Info
Lock Box: _ _ _ _
Year Built:
Agent Owned:
Admin Info (only visible to admin staff)
Some default
admin
info...
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Upload Docs
Search Docs
Label
Document Name
Added On
Reviewed